

Forms Management and Design Training
JULY 2000

CONTENTS

LIST OF FORMS ANALYSTS

POINTS OF CONTACTS CARD

**LIST OF COORDINATION CONTACTS FOR
DD FORM 67**

FORMS VS. FORMATS

HIDDEN FORMS

REVIEW TIPS

DESIGNS STANDARDS AND TIPS

LIST OF FREQUENTLY ASKED FORMS QUESTIONS

**Forms Management and Design Training
July 2000**

USAPA FORMS ANALYSTS

All analysts are eager to provide guidance and assist with forms management and design questions. We strongly urge proponents to call for guidance early in the process – when the prescribing publication and associated form(s) are being developed.

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COORDINATION CONTACTS
(required for DD Form 67, Block14)

14. Internal Coordination and Concurrence

a. Privacy Act	Ed Arnold	DAPE-ZXI-RM	DSN 224-0559 703-614-0559
b. Postal	Ed Arnold	DAPE-ZXI-RM	DSN 224-0559 703-614-0559
c. Data Elements	Bruce Haberkamp	SAIS-TAA-S	DSN 224-0756 703-614-0756
d. Reports	Sandra Stroud	DAPE-ZXI-RM	DSN 224-0454 703-614-0454

FORM VS. FORMAT

Form:

- Collects information in a standardized manner.
- Contains specific data elements.
- Contains orderly arrangement of data, usually in a process sequence.
- Aids preparation and retrieval of information (increases productivity).

Format:

- Suggests presentation of information.
- Allows lengthy narratives and unsolicited information.

"HIDDEN" FORMS

When reviewing publications, look for the following **Key Words** to alert you to the possibility of a hidden forms requirement:

Complete

Record

Enter on

Return

Fill in

Send

Fill out

Sign

Log

Submit

Post

Prepare

Another **dead give away** is an illustration that contains blank lines, often obviously intended for "fill in."

REVIEW TIPS

1. DA Form 260

- Block 2., Justification – any forms information included?
- Block 3, Related Publications, and Block 4, Publications to be Superseded – any forms listed? Verify whether listed pubs prescribed any forms. If yes, be sure those forms are listed in the publication's supersession notice.
- Block 6, Distribution Restriction – If yes, forms cannot be distributed electronically on USAPA web or CD.
- Block 8, Recommended Distribution – will identify which command levels are the users of the pub/form. "A" or "B" level pubs require RUPP chop and the "Applicability" paragraph requires a mobilization statement. Mobilization forms may need to be procured in paper as well as developed for electronic distribution.
- Part IV, Publication Control Action - proper channel/signature?

2. Manuscript

- Read " Summary of Change" – any forms information included?
- Title page –
 - Read "History" statement. Will confirm new or revised status.
 - Read supersession notice. Are superseded or rescinded forms included?
 - Read "Applicability." Good place to double check for the mobilization requirement.
 - Read "Distribution" statement. Will confirm the intended audience.

- Briefly thumb through text. Look for obvious forms implications – form illustrations, suggested “formats.”
- Check Appendix A. Are “prescribed” and “referenced” forms included?

3. DD Form(s) 67

- Properly completed (see DA Pam 25-31 for completion samples).
- Coordination complete?
- Processed through proper channels, with signatures?

ARMY DESIGN STANDARDS AND TIPS

Standards

File Extensions

- FRF = Unlocked FormFlow 1.1
- FRZ = Locked FormFlow 1.1
- FRJ = Unlocked FormFlow 2.2
- FRO = Locked Formflow 2.22

File Naming Conventions

- | | |
|-----------------------------|-------------|
| - DA Department of the Army | A####_R.FR* |
| - DD Department of Defense | D####.FR* |
| - OF Optional Form | O####.FR* |
| - SF Standard Form | S####.FR* |

Form Number (Front Page)

- Bottom Left Corner of form
- Font = 10pt Universe (WN) Bold
- Text Spacing = 10pt
- Use 4 digit year

Form Number (Second Page)

- Bottom Left corner of form
- Font = 8pt Universe (WN) Bold italic
- If form is to be printed and stocked in paper and printed front and back, put (Back) at the end of the year. Example: *DA FORM XXXX, JAN 2000 (Back)*.
- If form is Electronic Media Only, use "Page ___ of ___" on the bottom right corner of form in 8pt.

Page Margins

- ½ inch margins all around
- Grid = 1/6 Vertical, 1/10 Horizontal

Fonts (All Text Fonts are Universe (WN) and all Fill fonts are 10pt CG Times (WN))

- Title = 10pt Bold CAPS
- Directive Statements and Proponency = 8pt, period at end.
- Privacy Act – 8pt, with words **AUTHORITY, PRINCIPLE PURPOSE, ROUTINE USES, and DISCLOSURE** in 8pt Bold.
- Section titles = 8pt Bold CAPS
- Text for Data Elements = 8pt CAPS
- Supersessions = 8pt CAPS, period at end

Line Weights

- Border Box = 1/48
- Title Box = 1/72
- Section Box = 1/72
- Text Box = Hairline
- Fill Box = Hairline

Field Naming Conventions

- Field Names = No more than 10 characters, upper and lower case
- Comb Names = No more than 8 characters, upper and lower case
- Numbers = Try not to use numbers in naming a field. If numbers are needed, never start or end the field name with them. Place them in the middle of the field name.
- Special Characters = The only special character used in naming a field is the Underscore. No dashes or slashes.

Formatting Standards

- Date = Use Date Format, YYYYMMDD. Fix field length at 8 characters, no slashes, spaces, dashes, etc. Turn automatic date off.
- SSN = Use the Mask. Mask is NNN-NN-NNNN. Fix field length at 11 characters.
- Check boxes = Use Checkmark format with On Character = X, Off Character = Space or None, Empty - None, Fix field length at 1 character. Check Auto Tab On. Check Default Entry Off. Fill Font = CG Times (WN), 8pt or smaller depending on size of check box. Font should not be smaller than 6pt. Fill justification should be Center across, and Middle down. Text spacing = 8pt. Adjust margins as needed.

Tips

- Always have Enhanced Fonts on Screen and Enhanced Fonts on Printer turned on. This option is found on the toolbar under **TOOLS** and then **OPTIONS**. If this feature is not turned on you may experience overlapping or dropping off of words or sentences.
- Lay out items in sequential order of fill-in. If possible, place signatures and approval near bottom of form. If several data elements pertain to the same area, individual, etc, break form up into sections.
- Always use the feature **SNAP TO GRID**. This is located under the **VIEW** option on the toolbar. With this feature you will be able to layout your item blocks quicker and lines will be cleaner.

- Add E-mail Address, DSN and Fax Number fields to any form that collects address and phone number.
- Use Extreme caution when locking a FormFlow 2.22 file. After you have finished the design of your form and are ready to lock it, choose FILE, SAVE AS, choose FormFlow 2.0 Form (locked), change your file extension to FRO, hit the OK button, a screen will appear that states "Do you want to lock the objects or the entire form?", choose OBJECTS. The form that is on your screen now is the locked form. If you make any corrections to the form now and save it again, it is likely that you will replace your unlocked file with the locked file and there is no way to unlock that file at this point.
- Tables VS Combs – Advantage to using tables is that you will only have one item on the page and you can make each column a different size. However, with a table you can not put text inside the cell and you will have another Database file to collect the table information.
- Radio buttons VS Conditional Tabbing – Radio Buttons allow you to check only one box in a series of choices but you have to tab all the way through the choices to get to the next item. This allows the user more chance for error by accidentally choosing one of the other choices. Conditional tabbing also allows only one choice to be made but allows little to no errors in making your choice. After you make your selection you will tab to your next item. In order to change your selection you have to deselect your choice first before you can make another choice. Conditional tabbing is also used to guide you to another part of the form that needs to be filled out based on the previous selection.
- If having problems getting text to fit in a particular size text box, adjust margins and text spacing.
- If it appears that you are getting unwanted periods at the end of text, turn off RETURN under the VIEW in the toolbar.
- Merging Data in FormFlow 2.22 (Merging an Old Data File with a New or revised form)
 - Open the revised Form in FormFlow Filler.
 - Under DATA choose SAVE DATA AS and create a new database, make sure you give the new database a different name, click OK.
 - Under DATA choose OPEN DATA then choose BROWSE to locate old data file, select old data file and click OK. You may get an error message or two that reads "Error reading field:", click CANCEL until the error message no longer appears on screen.
 - Under FILE choose APPEND TO then BROWSE to locate the "new" data file, select your newly created data file and click OK. Again you may get the error message that reads "Error reading field:", click CANCEL until the message no longer appears on screen.
 - Under DATA choose OPEN DATA then BROWSE and select the new data file. Your old data should now be appended to your new data file.

Privacy Act Statement:
Words
AUTHORITY;
PRINCIPAL
PURPOSE;
ROUTINE USES;
and
DISCLOSURE,
Set Font as
Universe (VN)
8pt, Bold. Body
should be 8pt
regular.

Field Naming
Conventions:
No more
than 10
characters.
Try not to use
numbers in
name. If
numbers are
needed, never
start or end
the field name
with them.
No special
characters
such as
dashes or
slashes. The
underscore
may be used.

Use Checkmark format with On
Character = X, Off Character =
space or none, Empty = none.
Fix field length at 1 character.
Check Auto Tab On. Check
Default Entry Off. Fill Font =
CG Times (VN) 8pt or smaller
depending on size of check
box. Font should not be smaller
than 6pt. Fill justification should
be Center Across and Middle
Down. Text spacing = 8pt.
Adjust Margins as needed to
center X in box.

Set Title in Universe
(VN) 10pt, Bold,
Caps. Set
Proponency line in
Universe (VN) 8pt,
upper and lower case.

Form Approval and
Requirement Control
Symbol:
Set Font at Universe
(VN) 8pt, Bold, Italic.

REASSIGNMENT PROCESSING REPORT				Form Approval OMB No. 804-2222 Expiration Date 10-31-3000		Requirement Control Symbol DD-COMP (AR)2222	
For use of this form, see AR 10, the proponent agency is ODCSPER.							
DATA REQUIRED BY THE PRIVACY ACT OF 1974							
AUTHORITY:		10 USC 3012, 8012 and 5031					
PRINCIPAL PURPOSE:		For personnel service support..					
ROUTINE USES:		To request f family housing.					
DISCLOSURE:		disclosure of however, may The major group or division is a Section. Center on line in 8pt Bold, Caps. A secondary heading is a Part. Center on line in 8pt Bold, upper and lower case. to provide complete information,					
SECTION I - PERSONNEL AND ASSIGNMENT MANAGEMENT D							
Part A - Personnel data							
1. TO		2. FROM					
3a. NAME (Last,First, MI)		3b. SEX		3c. SSN		3d. GRADE	
JOHN DOE		<input checked="" type="checkbox"/> MALE <input type="checkbox"/> FEMALE		999-99-9999			
4. CURRENT UNIT/STATION		5. E-MAIL ADDRESS		6. TELEPHONE NO. (Include area code and DSN)		7. FAX NUMBER	
		USAPA@ARMY.MIL		(999) 999-9999 DSN 999-9999		(999) 999-9999	
PART B - Assign							
8. REASSIGNED TO (Unit, UIC, APO, country)		Add E-mail Address and Fax Number to any form that collects address and phone number.				9. REPORT DATE (YYYYMMDD)	
						20000101	
SECTION II - HOUSING AND FAMILY TRAVEL DATA							
10. FAMILY MEMBER DEPLOYMENT SCREENING COMPLETED							
<input checked="" type="checkbox"/> a. Enrollment warranted <input type="checkbox"/> c. Enrollment not							
<input type="checkbox"/> b. Enrollment validate <input type="checkbox"/> d. Documentation att							
DESTINATION		ARRIVAL DATE		MILEAGE		RATE (PER MILE)	
				50		0.35	
				100		0.35	
						17.50	
						35.00	
11. SIGNATURE		12. DATE (YYYYMMDD)					

Title Box:
Line = 1/72

Section Box:
Top Line =
1/72

Text and Fill
Boxes:
Line =
Hairline

Border Box:
Line = 1/48

DA FORM 8889, JUL 2000

DA FORM 8889, JULY 1954 EDITION IS OBSOLETE.

Use 4 digit year

Supersession Notice:
Universe (VN), 8pt.

Form Number and Edition Date:
Bottom Left corner of form. Universe
(VN), 10pt, Bold, All Caps.

FREQUENTLY ASKED FORMS QUESTIONS

How do we manage web forms that are filled out and submitted on-line?

Forms that are completed and submitted on-line are subject to the same management controls as paper or other electronic forms, even though they may have a different appearance. Information collected in an automated system is still subject to Department of the Army forms policy. While the process may be automated in lieu of using hard copy forms, the requirements remain the same. The form needs to be prescribed, the Army proponent needs to be identified, and the form needs to be indexed. A DD Form 67 is still required to bring the on-line form into the Army system.

What about forms in automated systems?

Those responsible for developing systems that incorporate forms used by the Army are required to incorporate the form numbers into the automated system. Even if the appearance of a form is changed somewhat in the automated system, it is still a form. Changing the title or fill-in areas does not change the fact that it is a form.

How do we stop people from developing their own forms in automated systems without notifying USAPA or their forms managers?

We can't. However, we can remind personnel who are developing these unofficial forms that the Army forms program, as directed in AR 25-30, implements Title 44 of the United States Code and the Government Printing and Binding Regulations published by the Joint Committee on Printing (JCP) of the U.S. Congress. Chapter 3 in AR 25-30 and DA PAM 25-31 are devoted to the management of forms. We will ensure that the proponent takes the appropriate steps to prescribe and index the form when the prescribing directive is revised.

Are NAF forms handled differently than other Army forms?

No. NAF forms are subject to the same management controls. Forms initiated by Army NAF activities are processed the same way as forms initiated by Army appropriated fund activities. Where the funds originate does not make a difference.

What determines if a form is a critical item?

Critical items are publications or forms that are specifically prescribed to support the Army during mobilization or combat, or are needed to sustain and support the Army combat support role, or are essential to the Army's daily operation. The critical items list is controlled by Doug Knox at the Distribution Operations Facility in St. Louis. Doug's phone number is 214-263-7305 or DSN 693-7305, ext 300.

Who determines if a form is required for mobilization?

That a prescribing document and/or form is required for mobilization is determined by the Army proponent. This requirement is then reviewed by FORSCOM during the staffing process.

How long am I required to retain obsolete files?

DA PAM 25-31 states that forms should be held for 3 years. DA Forms are retained for 5 years.

I want to print a form that is not a critical item or required for mobilization even though it is available on the Army Electronic Library.

The Army's Less Paper Policy, HQDA Letter 25-98-1, directs that forms that are electronic will not be printed in paper unless they are critical items or required for mobilization. This includes sets where all copies are alike. Requests for exceptions to this policy must be elevated up the chain of command to the Administrative Assistant to the Secretary of the Army.

How can I determine what forms are prescribed by a prescribing directive?

Appendix A of Army Regulations should contain a list of prescribed and referenced forms. If you are in the process of reviewing/revising a document, you may contact one of the forms analysts at USAPA to obtain a list of the forms that are listed in the Army data base as prescribed.

Why is a form both -R and electronic?

Initially -R forms were considered good candidates for electronic forms because they are not stocked, the forms in the back of the prescribing directives are sometimes difficult to copy, and the electronic forms are easier to access. When the prescribing directives are revised and are electronic media only (EMO), the -Rs on the forms are removed and the forms are given new edition dates because there are no -R forms in electronic publications. The forms are then EMO forms.

Why does a form have to have a prescribing publication?

Use of a prescribing publication is directed by AR 25-30, change 1, para 3-2, and DA PAM 25-31, paragraphs 1-8 and 1-9. If the use of a form has not been directed in a prescribing publication, it may be argued that the form is not official and need not be completed.

Why is my printed electronic form not legible? The fonts are too large, words are missing from the form and the lines are not straight.

When you print the form, PLEASE TURN YOUR ENHANCED PRINTER FONTS ON. In FormFlow filler, this is under Tools Options, check enhanced fonts on printer, and enhanced fonts on screen. Otherwise your form will appear distorted.

What are "E-forms"?

The Army Electronic Forms (E-forms) Program is a developmental project to convert departmental (DA, DD, Standard, Optional) forms to electronic format. The Electronic Forms Library is available on-line and CD-ROM. Although there is no standard E-forms software, U.S. Army Publishing Agency uses JetForm FormFlow 2.22 software to develop E-forms. To fill and print these forms, you must use JetForm FormFlow 1.11, 2.22, or 99 "filler" software. USAPA has also converted its forms library to Portable Document Format (PDF) as an additional way to access the forms. To use the PDF forms, Adobe Acrobat Reader software is required on your PC. You can download this software free at: <http://www.adobe.com/prodindex/acrobat/readstep.html>. The PDF forms are "read and/or print" only and cannot be electronically filled out.

The form I am looking for is not available. How can I request a form be made electronic?

USAPA will continue to convert paper-based (Hard Copy) departmental forms to electronic forms (E-Forms) formats. Any Army-wide form that is not sensitive, not accountable, does not require special inks or papers, or does not have a special construction or usage needs (e.g. certificates, labels, oversized, and manual fill-in forms) will be converted. These forms are posted to our web site as they are converted. We are no longer asking for customer requests for specific forms to be converted. Instead, we ask that you periodically visit the USAPA E-Forms Web Page for the latest inclusions of electronic forms.

Will USAPA continue to support PerForm Pro?

PerFORM PRO form files were removed from our inventory of forms. USAPA is designing electronic forms in FormFlow 2.22 software. For users desiring to upgrade to FormFlow 2.22, the Small Computer Program (SCP) office has a contract for Army users to purchase this software at a discounted price. If you are interested in purchasing this software, contact one of the following: Steve Miller at DSN 987-6786 or commercial (732) 427-6786, millers2@mail1.monmouth.army.mil or Comark Federal Systems at 1-800-788-4688, tleskoski@comark-federal

Does Army have an Enterprise License for form software?

No. At this time, the Army does not have an Enterprise site license for the forms software.

Is FormFlow software available for download?

No, there is not a site in which the software is available for download.

How can I get the software to read/fill-in the E-Forms?

To purchase the current software for use with our forms, you need JetForm FormFlow, V2.22. This can be purchased through the Small Computer Program Office off the ET1 contract by contacting:

Comark Federal Systems 1-800-788-4688
703-227-9200

Go to www.comark-federal.com/gsa/vendor.cfm and Select JetForm for pricing, then contact a Comark Federal Systems' Representative to place an order.

It is highly recommended that you purchase the maintenance agreement at the time of purchase. JetForm plans on releasing upgrades within the next year and the insurance will allow you the opportunity to upgrade at no further costs.

Army CECOM point of contact for the ET1 contract is Steve Miller, (732) 427-6786, millers2@mail1.monmouth.army.mil.

Do I require a Publication Account to download E-Forms?

You do NOT need a Publications account to download E-Forms from the USAPA web site. To order the Army Electronic Library, CD-ROM, you must have a valid publications account number. Place a subscription for EM 0001 Army Electronic Library (AEL) CD-ROM. The IDN is 040803. The easiest way to change your requirements is to use our web site for Army Publications Ordering and Subscription System [<http://www.usapa.army.mil/pubs/orders.html>], then click on Publications Ordering System, then click Subscription Add/Change/Delete. Follow the instructions on the page.

How do I get a Publications Account?

Paragraph 2-1, DA PAM 25-33 (User's Guide for Army Publications and Forms) explains who may have an Army publications account. To establish an account, follow the guidance in the pamphlet and complete DA Form 12-R. Submit DA Form 12-R by fax to (314) 263-7395/6558 - DSN is 693-7395/6558. Suggest a verbal or email follow-up with Ms. Pople (314) 263-7305 x221 (DSN prefix is 693) which will guarantee visibility and acknowledgement of your fax. Ms. Pople may also be reached by email at poplem@arpstl-pub1-emh1.army.mil

What Forms do you have in E-Forms format?

All of our USAPA web users have access to the SEARCH web form [<http://www.usapa.army.mil/forms/dosearch.html>] to assist in searching for forms that are available at the current time. We also produce a CD-ROM - Army Electronic Library (EM 0001) which contains all of our E-Forms as seen on the web site. Special software programs (JetForm FormFlow, V1.11, 2.22, 99 or Adobe Acrobat Reader software) are required on your PC to run these forms.